

Executive Branch Personnel Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

JOYCE, WILLIAM T

Senior Advisor, Department of Energy

Date of Appointment: 05/07/2018

Other Federal Government Positions Held During the Preceding 12 Months:

None

Electronic Signature - I certify that the statements I have made in this form are true, complete and correct to the best of my knowledge.

/s/ JOYCE, WILLIAM T [electronically signed on 04/26/2018 by JOYCE, WILLIAM T in Integrity.gov]

Agency Ethics Official's Opinion - On the basis of information contained in this report, I conclude that the filer is in compliance with applicable laws and regulation: (subject to any comments below).

/s/ Stewart, Yvonne R, Certifying Official [electronically signed on 05/03/2018 by Stewart, Yvonne R in Integrity.gov]

Other review conducted by

/s/ Stewart, Yvonne R, Ethics Official [electronically signed on 05/03/2018 by Stewart, Yvonne R in Integrity.gov]

U.S. Office of Government Ethics Certification

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Data Revised 05/03/2018

Data Revised 04/30/2018

Data Revised 04/27/2018

Comments of Reviewing Officials (public annotations):

PART	#	REFERENCE	COMMENT
N/A	N/A	General	(04/30/2018, Stewart, Yvonne R): 502: Booz Allen Hamilton OA: Manager Carrot Strategies International (LLC used to monitor dues/payments for sailboat) OA: VP, Vanleer Harwood (buying, selling and milling of hardwood logs)

1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME		CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Carrot Strategies International	See Endnote	Arlington, Virginia	Corporation	Manager	1/2015	Present
2	Booz Allen Hamilton		McLean, Virginia	Corporation	Management Consultant	10/2010	5/2018
3	Vanleer Hardwoods		Vanleer, Tennessee	Corporation	Vice President	4/2018	Present

2. Filer's Employment Assets & Income and Retirement Accounts

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Carrot Strategies International (Recreational boating organization)	See Endnote	N/A	\$1,001 - \$15,000		
2	Vanleer Hardwoods (Buying, milling, and selling hardwood logs and their by products.)	See Endnote	N/A	\$15,001 - \$50,000		
3	Booz Allen Hamilton	See Endnote	N/A		Salary/Bonus	\$180,225
4	Booz Allen Hamilton defined contribution plan		No			
4.1	Russell Large Cap Value Index		Yes	\$1,001 - \$15,000		\$201 - \$1,000
4.2	LifePath Retirement Income		Yes	\$15,001 - \$50,000		\$1,001 - \$2,500
4.3	Stable Value Fund		Yes	\$1,001 - \$15,000		\$201 - \$1,000

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	Booz Allen Hamilton	McLean, Virginia	I will continue to participate in this defined contribution plan. The plan sponsor will not make further contributions after my separation.	10/2011

4. Filer's Sources of Compensation Exceeding \$5,000 in a Year

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
1	Booz Allen Hamilton	McLean, Virginia	Served as a Management Consultant to various clients.

5. Spouse's Employment Assets & Income and Retirement Accounts

None

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	TD Ameritrade Investment Account	No			
1.1	ID Watchdog Inc	N/A	\$15,001 - \$50,000	Dividends Capital Gains	\$5,001 - \$15,000
2	TD Ameritrade Roth IRA	No			
2.1	Parnassus Core Equity Fund	Yes	\$1,001 - \$15,000		\$201 - \$1,000

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#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.2	Massachusetts Investors Growth Stock Fund Class A	Yes	\$1,001 - \$15,000		\$201 - \$1,000
2.3	Amazon.com, Inc. - Common Stock	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$201 - \$1,000
2.4	iShares Core S&P Small-Cap ETF	Yes	\$1,001 - \$15,000		\$201 - \$1,000
2.5	American Funds Capital World Growth and Income Fund	Yes	\$1,001 - \$15,000		\$201 - \$1,000
2.6	Vanguard High Dividend Yield Index Fund ETF Shares	Yes	None (or less than \$1,001)		\$201 - \$1,000
3	Rental Home, Arlington, VA	N/A	\$250,001 - \$500,000	Rent or Royalties	\$15,001 - \$50,000
4	Capital One	No			
4.1	Child Savings Fund	N/A	\$1,001 - \$15,000	Interest	None (or less than \$201)
4.2	Kilimanjaro Savings Fund	N/A	\$1,001 - \$15,000	Interest	None (or less than \$201)

7. Transactions

(N/A) - Not required for this type of report

8. Liabilities

#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	Booz Allen ECAP 401K	Personal Loan	\$10,001 - \$15,000	2018	4.75	5 Yr

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#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
2	Booz Allen ECAP 401K	Personal Loan	\$10,001 - \$15,000	2016	3.5%	5 Yr
3	Wells Fargo - Home Mortgage	Mortgage on Personal Residence	\$250,001 - \$500,000	2009	3.875	30 Yr
4	Bank of America	Credit Card	\$10,001 - \$15,000	2009	7.74%	revolving

9. Gifts and Travel Reimbursements

(N/A) - Not required for this type of report

Endnotes

PART	#	ENDNOTE
1.	1	Per filer, this is a LLC used to monitor dues/payments for sailboat)
2.	1	Per filer, received no income. LLC used to monitor dues/payments for sailboat.
2.	2	Per filer, received no income.
2.	3	Per filer salary/bonus is a total of calendar year 2017 and 2018 up to date of filing.